

Kinleigh Folkard & Hayward



Pillars of the community

London's 20-minute neighbourhoods

Autumn/Winter 2021



Local neighbourhoods are being scrutinised by home movers more than ever. What does Outer London offer buyers looking for amenity-rich and walkable communities?

The quality and convenience of our local neighbourhoods took centre stage during the pandemic. Now, with COP26 shifting attention to the environment, the focus on sustainable, walkable communities is likely to intensify. Home movers, who are currently living with a lasting legacy of home / hybrid working, will also be scrutinising potential neighbourhoods in a different way.

The 20-minute neighbourhood is an urban development concept based on the idea that amenities and services could be reached within a 20-minute walk. It has risen quickly in the minds of policymakers and the public worldwide.

Our research highlights the most walkable neighbourhoods in Outer London. This independent analysis evaluated and ranked 470 Outer London neighbourhoods*. For each, we assessed amenities considered by planners to be an integral part of a 20-minute walkable neighbourhood.

*Based on OS Gazetteer.

Where are the most walkable neighbourhoods in Outer London?*

| Area, with no. of walkable neighbourhoods | Top boroughs by area, with no. of walkable neighbourhoods |
|---|---|
| West 15 | Ealing 6 |
| East 12 | Newham 8 |
| South 11 | Richmond 3 |
| North 9 | Haringey 6 |

West Brent, Ealing, Harrow, Hillingdon & Hounslow
East Barking & Dagenham, Bexley, Havering, Newham, Redbridge & Waltham Forest
South Bromley, Croydon, Kingston Upon Thames, Merton, Richmond upon Thames & Sutton
North Barnet, Enfield & Haringey

Source: Dataloft, VOA, OS, Land Registry
*Top 10% based on ranking

2041 target

80% of trips

to be by cycle, foot
or public transport

Source: Mayor of London

Connectivity

For Londoners, the connectivity between places (most commonly by Tube) across the Capital also remains an important consideration for buyers. House price growth will be driven by well-connected neighbourhoods that also offer quality amenities within a 20-minute walk.



We continue to help landowners and developers optimise their schemes for their exit strategy. Sites with characteristics such as: within a regeneration area, within a walkable neighbourhood, close to green open space or well-connected by tube, rail and cycle superhighway, will usually have the greatest potential.

John East – Director, Land and New Homes, KFH

Top 10% (47) of Outer London neighbourhoods based on amenity provision within a 20-minute walk

- Inner London
- Outer London

Methodology

Using the Dr Wei Yang model (see back page), the number of amenities by category, within a 5, 10, 15 and 20-minute walk, was calculated for 470 neighbourhoods in Outer London. Each neighbourhood was ranked from one to 470. Upton Park was ranked as number one, having the most amenities and therefore being the most walkable.

Source: Dataloft, VOA, OS, Land Registry

N.B. The location of the neighbourhood is shown by the central point. 20-minute walkable neighbourhoods can overlap and cross borough boundaries. The average walking speed used to calculate the radii from the neighbourhood centres was 5km per hour.



Potential exists for uplift in average house prices in walkable neighbourhoods compared to borough averages

| Neighbourhood | Borough | Amenity ranking* 1 = most walkable | Potential value uplift** |
|---------------|----------|---------------------------------------|--------------------------|
| Croydon | Croydon | 3 | 21% |
| Plaistow | Newham | 19 | 18% |
| Wood Green | Haringey | 22 | 20% |

*Ranking out of 470 Outer London neighbourhoods

**Average sale price for neighbourhood catchment compared to borough average in last 12 months, using Land Registry price paid data for all property

Croydon

Case study

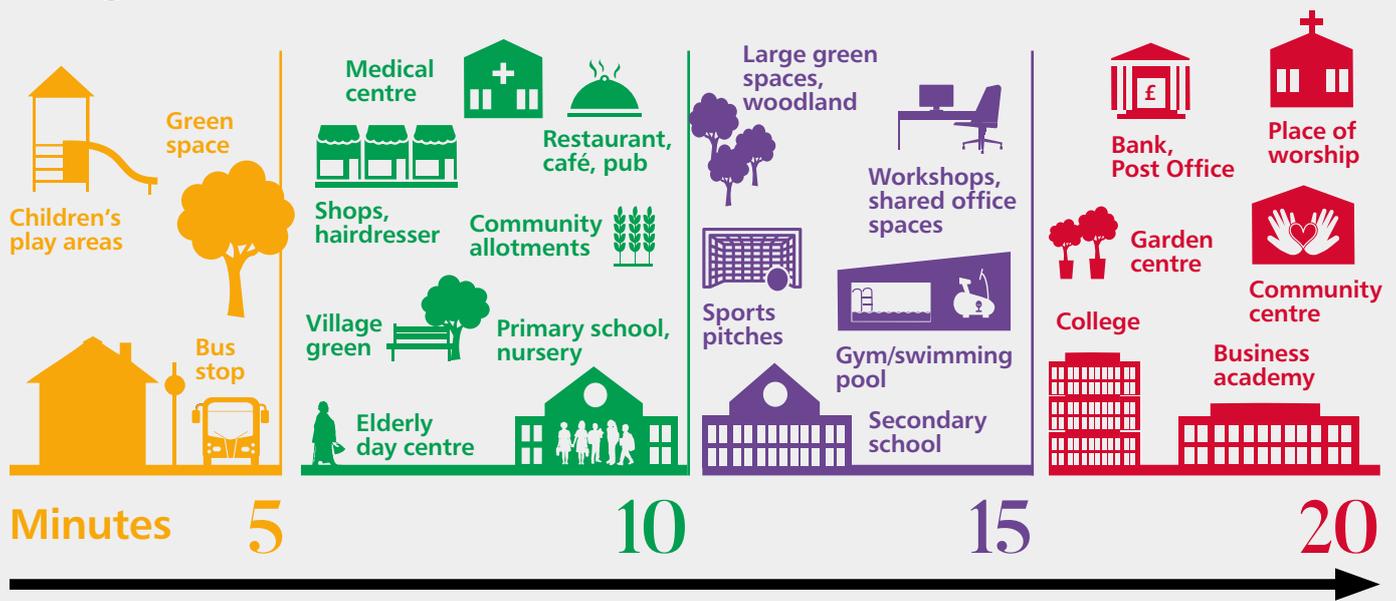
- | | | | |
|--|--|--|--|
| <ul style="list-style-type: none"> 1 Small green space 1 Play area 42 Bus stops | <ul style="list-style-type: none"> 48 Restaurants 15 Cafés 32 Pubs 818 Shops 5 Primary schools 4 Nurseries 5 Hairdressers 4 Elderly care | <ul style="list-style-type: none"> 1 Large green space 6 Gyms 3 Secondary schools 14 Woodlands 2 Playing fields | <ul style="list-style-type: none"> 28 Places of worship 7 Community centres 18 Banks 1 Post Office 3 Further education colleges |
|--|--|--|--|



N.B. example of the amenity counts behind the rankings

The 20-minute neighbourhood

Lockdowns and the growing green movement are adding weight to this planning concept. The premise is that everyday amenities should be within a 20-minute walk/cycle.



Source: Dr Wei Yang, Dataloft

Building beautiful, walkable, sustainable places

On 20 July the then Secretary of State for Housing, Robert Jenrick, announced a range of measures intended to revolutionise planning by aiming to preserve quality, beauty and sustainability at the heart of local decision making. It was anticipated that the measures will improve community infrastructure, champion neighbourhood design and support walking and cycling to boost health and wellbeing. The measures include: a National Model Design Code, an updated planning framework and the creation of the Office for Place and The Advisory Board.

Our vision is to help families, neighbourhoods, councils, landowners, housebuilders and developers more easily create places in which our communities can prosper. *Nicholas Boys Smith, Chair of Advisory Board for the Office for Place.*

The cabinet reshuffle and appointment of Michael Gove as the new housing minister has put the planning reforms on hold, with the focus set to be on overlooked families and levelling-up of regional inequalities.

Funds for London's town centres

On 21 July the Mayor of London, Sadiq Khan, announced that 35 town centres across London, including Acton, Bromley, Crystal Palace and Peckham, will each be given £20,000 to help protect their future after being adversely hit by the pandemic. The projects will help to bring vacant properties back into use, protect cultural spaces and support high street employment. These include a strategy for Acton High Street bringing together bids from community groups and the transformation of an old car park in Crystal Palace to provide flexible and affordable workspace.


September
2022
Pavement licences
for outside dining
extended until
September 2022

Available for comment or discussion:

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